



Better Buildings Residential Program Solution Center

Danielle Sass Byrnett

Agenda

- Overview
- Tour of Solution Center
 - Framework
 - Handbooks
 - Content through Examples
- Next Steps
 - Peer Review
 - Become a Beta User!
 - Future Enhancements

Better Buildings Residential Program Solution Center Overview

Purpose: No More Starting from Scratch



- Help residential energy efficiency programs minimize trial and error to achieve success.



- Help programs and partners plan, operate, and evaluate their programs.



- Provide a living repository of examples, lessons, and resources.

Audiences: Programs & Partners

- Target audiences:

- 1⁰ Program Administrators and Implementers

- utilities, state energy offices, municipal governments, NGOs

- 2⁰ Program and Service-Delivery Partners

- contractors, financial institutions, marketing firms

- 3⁰ Program Evaluators



Development Timeline

March - November 2012: Framework Development, Review, Consultation

Reviewed DOE guides, external literature, BBNP workshops and peer calls; vetted with stakeholders



June - July 2012: Feedback from Key Partners & Intended Users

Feedback from EE NGOs and programs, identified complementary work, REES conference input and ideas



July - October 2012: Drafted and Vetted Lessons Learned

Based on experience from 2 yrs of BBNP workshops and peer exchange calls, Now = Tips for Success



November 2012 - April 2013: Platform Development

Built platform, designed content format, developed selection of handbooks



April 2013 - April 2014: Content and Functionality Development (1st release)

All handbooks complete, additional Solution Center functionality developed



May 2014 – September 2014: 1st Release Available During Peer Review & Beta Testing

Tips for Success enhanced, content & function vetted by external peer reviewers; beta users test all aspects



Fall 2014: Public Launch (2nd release)

All content and functionality in place; ready for user submissions



Solution Center Development Team

Content Development

- Market Position & Business Model
 - Subid Wagley (DOE)
 - Athena Bertolino (Ross Strategic)
 - Rebecca Foster (Vermont Energy Investment Corporation)
- Program Design & Customer Experience
 - Megan Billingsley (Lawrence Berkeley National Laboratory)
 - Tom Beierle (Ross Strategic)
 - Richard Faesy (Energy Futures Group)
- Evaluation & Data Collection
 - Dale Hoffmeyer (DOE)
 - Stacy DeGabriele (Eastern Research Group, Inc. - ERG)
 - Nikki Kuhn (Vermont Energy Investment Corporation)
- Marketing & Outreach
 - Jonathan Cohen (DOE)
 - Kathleen Brady, Shannon Johnson (ERG)
- Financing
 - Steve Dunn (DOE)
 - Charlie Goff (ERG)
 - Matthew Brown, Dave Carey (Harcourt Brown & Carey)
- Contractor Engagement & Workforce Development
 - Megan Billingsley (Lawrence Berkeley National Laboratory)
 - Jennifer Tice, Darcy Peth (Ross Strategic)
 - Mike Rogers (OmStout Consulting)

Editors

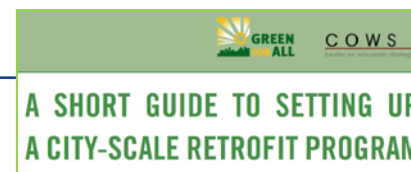
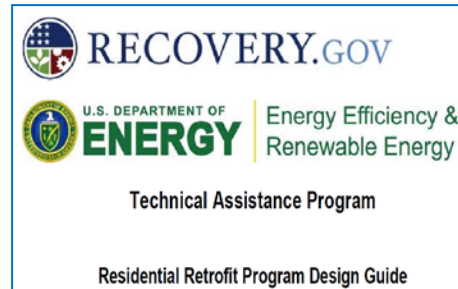
- David Lee (DOE)
- Danielle Sass Byrnett (DOE)
- Amanda Chiu (Energetics Incorporated)

Platform Development

- Chrissi Antonopoulos (Pacific Northwest National Laboratory - PNNL)
- Michael Baechler (PNNL)
- Linda Connell (PNNL)
- Julia Walker (PNNL)

Diverse Content Sources

- Content reflects the expertise and experience of:
 - Better Buildings Neighborhood Program grant recipients
 - Home Performance with ENERGY STAR Sponsors
 - EERE Technical Assistance Program
 - Guidance published by energy efficiency organizations about residential programming
 - *Future: submissions by users*



Structured Criteria for Including Guidance and Examples

Evidence Progression



What You Are About to See

- **Version 1 (beta) release**
- Contains ~95% of expected content
- Includes ~90% of features & functionality
- Allows users to review content, test the tool, and provide comments
- We welcome your feedback through this session or email: BBRPSolutionCenter@erg.com

Version 2 (full) release expected in Fall 2014

Better Buildings Residential Program Solution Center Tour

Solution Center Home Page

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Browse by Design Phases

Browse by Content Types

Better Buildings Residential Program Solution Center

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BROWSE BY:

Program Components

Program Design Phases

Content Types



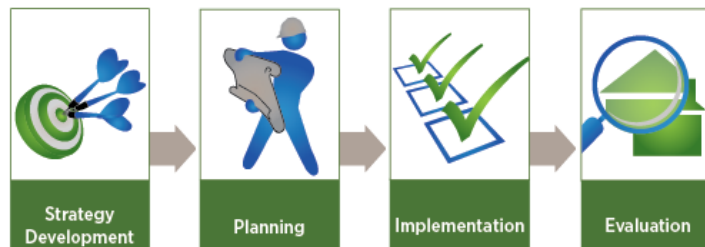
Browse by Program Components

Center is a repository of examples, agency programs. It is intended to help generate, and evaluate their programs.

Handbooks



Explore Program Design Phase Resources



Search

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Finance Favorites

6 items

Marketing & Outreach Favorites

1 items

+ New Favorites Folder

RECENTLY UPDATED RESOURCES

[Program Design & Customer Experience – Deliver Program](#)

[Efficiency Maine Downloads and Forms Portal](#)

[New York State Energy Research and Development Authority \(NYSERDA\) Home Performance with ENERGY STAR Contractor Manual](#)

[EnergySmart Residential Survey \(81 KB\)](#)

[RePower Bainbridge Upgrade Survey \(333 KB\)](#)

Recent Content

MOST POPULAR HANDBOOKS

[Market Position & Business Model – Overview](#)

[Marketing & Outreach – Overview](#)

[Financing – Overview](#)

[Program Design & Customer Experience – Overview](#)

[Market Position & Business Model – Assess the Market](#)

Popular Handbooks

ACKNOWLEDGEMENTS

The U.S. Department of Energy thanks the following individuals who conducted an expert review of the Better Buildings Residential Program Solution Center handbooks:

Content: Six Program Components






Content: Four Program Design Phases



7 Tabs in Every Handbook

Description: Why the stage is important and what user will learn

Contractor Engagement & Workforce Development – Overview

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Description

Step-by-Step

Tips for Success

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Description

Successful residential energy programs depend on strong relationships with contractors. Contractors employ home performance professionals who implement energy efficiency measures in homes. These contractors are the face of your program, and, therefore, critical partners in your success.

Recognize contractors' critical role and deliberately approach workforce development to maximize your program's impact. Benefits of effective contractor relationships, contractor support, and workforce development efforts include:

- Contractors that actively engage in your program and help meet your shared goals
- Efficient lead generation and sales efforts by contractors in line with their ability to deliver quality installations
- High conversion rates that reflect higher homeowner participation in your program
- High quality of home performance services provided to homeowners
- Homeowner confidence that energy savings and comfort improvements will be realized, due to effective quality assurance and communications
- Growth potential for contractors expanding in or entering the home performance market
- Good job opportunities for local, qualified home performance professionals.

Recruiting, developing, and maintaining enough contractors to work with your program requires ongoing effort. Leading programs engage

Key Resources

- [DOE Guidelines for Home Energy Professionals](#) include standard specifications for quality work, critical tasks and core competencies for effective training programs, and a framework for professional certifications. The website includes job task analyses that describe the tasks and skills needed for specific jobs, information about accredited training programs, downloadable training modules, and other resources.
- [DOE Building America Solution Center](#) provides home performance professionals with building science resources, integrated energy efficiency tools, case studies, and best practices designed to dramatically reduce energy use in new and existing homes. This website includes expert information on hundreds of high-performance design and construction topics, including air sealing and insulation, HVAC components, windows, indoor air quality, and more.

Handbooks – Step-by-Step

Step-by-Step: Detailed *what* and *how* information

Market Position & Business Model – Assess the Market

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Step-By-Step

To determine your organization's market position there are several important steps to consider.

- ▶ Assess potential market demand for energy efficiency products and services
- ▶ Assess how the market is already being served by other organizations—and what gaps exist for your organization to fill
- ▶ Assess your strengths and capabilities to provide products and services in the market

[Expand All](#)

▼ Assess potential market demand for energy efficiency products and services




As your organization enters the residential energy efficiency market or expands its existing role, make sure you have a solid understanding of current and potential market demand for such services. A variety of factors can influence demand. Examples include:

- Local, state, and regional policies (e.g., energy disclosure requirements, utility energy efficiency targets) that promote energy efficiency.
 - The [DSIRE database](#) provides comprehensive information on state, federal, local, and utility incentives and policies that are in place to support renewable energy and energy efficiency.
 - The U.S. Department of Energy's (DOE) 2007 report [State and Regional Policies That Promote Energy Efficiency Programs Carried Out by Electric and Gas Utilities](#) describes policies that could promote cost-effective programs, implemented by electric and natural gas utilities, to reduce energy consumption.
 - The [National Action Plan for Energy Efficiency](#) identifies key barriers limiting greater investment in cost-effective energy efficiency, describes policy recommendations to overcome the barriers, and documents policy and regulatory options for greater attention and investment in energy efficiency. The [State and Local Energy Efficiency Action Network](#) builds on the Action Plan by focusing on the assistance that states and local governments need to advance policies and practices that will bring energy efficiency to scale.

Handbooks – Tips for Success (1 of 2)

Tips: Lessons based on documented experience from multiple programs

Program Design & Customer Experience – Overview

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Description Step-by-Step **Tips for Success** Examples Toolbox Topical Resources Quick Links

Tips for Success

In recent years, hundreds of communities have been working to promote home energy upgrades through programs such as the Better Buildings Neighborhood Program, Home Performance with ENERGY STAR, utility-sponsored programs, and others. The following tips present the top lessons these programs want to share related to this handbook. This list is not exhaustive.

Make upgrade options clear and concise for customers

Programs in many regions of the U.S. find that the concept of home performance is new to homeowners. These homeowners typically have little idea how energy efficiency measures compare (e.g., energy savings benefits of insulation versus new windows) and they might not have heard about some effective measures, such as air sealing. Several programs have devised simple approaches to help customers understand the energy and cost savings and other benefits they will achieve from various types of measures, so homeowners can choose what is best for them. Recognize though that customers may have other priorities when considering an assessment's proposed measure (e.g., improving the look of their home with new windows, replacing an aging furnace before winter weather sets in).

- [Austin Energy](#) developed a form to estimate energy savings using a point system that contractors could use with residents during a home assessment. The form helped contractors and customers quickly determine which measures would achieve 15% energy savings in the home. Texas A&M's Energy Systems Laboratory validated the point system for the program to ensure its accuracy and integrity. The program found that this streamlined approach was appealing to customers and contractors.
- [Los Angeles County's Energy Upgrade California](#) implemented the [Flex Path program](#)  that used a point system to show the energy savings from a menu of energy upgrade measures. To be eligible for program rebates, residents then selected which measures they would like to undertake that would total over 100 points and achieve 15% energy savings.

Video Content (2 of 2)

[Description](#) [Step-by-Step](#) [Tips for Success](#) [Examples](#) [Toolbox](#) [Topical Resources](#)

Tips for Success

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[Expand All](#)

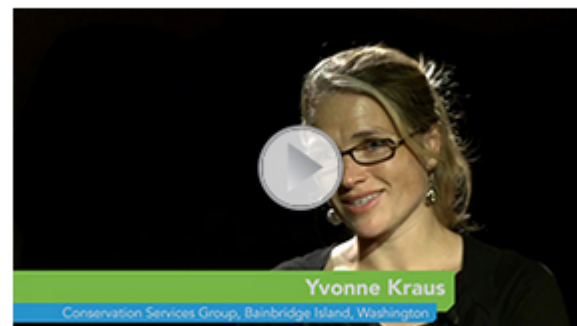
▼ **Adapt messages to your primary target audience's needs**

In Their Own Words: Benefits of Market Segmentation



Source: U.S. Department of Energy, 2012.

In Their Own Words: Messaging to Motivate



Source: U.S. Department of Energy, 2012.

Handbooks - Examples

Examples: Case studies, program presentations and reports, materials from individual energy upgrade programs

Financing – Communicate Impacts

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Examples

The following resources are examples from individual residential energy efficient program presentations and reports, and program materials. The U.S. Department of Energy

Case Studies

[Spotlight on Austin, Texas: Best Offer Ever Produces Upgrades in Record Time](#)

Author: U.S. Department of Energy

Publication Date: 2011

With its Best Offer Ever promotion, Austin Energy completed comprehensive energy upgrades in a record 564 homes in only six months--more than 10 times the utility's typical participation rate. To quickly develop momentum for BetterBuildings-Austin Energy's Clean Energy Accelerator program with homeowners, Austin Energy leveraged its existing Home Performance with ENERGY STAR® infrastructure, experience, and contractor base but added a comprehensive rebate/financing offer for a finite launch period. Demand soared, and due to thoughtful planning, Austin Energy and its contractors were able to keep up with requests for energy evaluations, inspections, improvements, and loan origination, while learning valuable lessons along the way.

[Using Credit Enhancements to Leverage Existing CDFI Capacity: Indianapolis](#)



Author: Lawrence Berkeley National Laboratory

Publication Date: 2012

Highlights the EcoHouse Project Loan Program, which provides fixed interest rate financing for energy improvements among households that are otherwise unlikely to participate at market rates.



Better Buildings
NEIGHBORHOOD PROGRAM
U.S. DEPARTMENT OF ENERGY

Service Delivery

Spotlight on Austin, Texas:
Best Offer Ever Produces Upgrades in Record Time

Key Takeaways

- Use valuable, short-term promotion to jump-start program interest
- Build on existing energy efficiency efforts to launch quickly and learn for the next iteration
- Plan for contingencies and resolve your errors

"Getting on the landscape fast with some successes built positive momentum. There will be warts, so set reasonable expectations... but it is a great way to let people know you are on the scene."

—Karl Rábago, Vice President, Austin Energy

Launch With a Short-Term Promotional Offer to Jump-Start Participation

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The Best Offer Ever

Austin Energy's high-value promotion—the Best Offer Ever—presented customers who signed up for an energy upgrade between October 1 and December 31, 2010, with a significant financial incentive, resulting in 564 Home Performance with ENERGY STAR upgrades in six months. In the past, participants in Austin Energy's Home Performance with ENERGY STAR program received a free energy evaluation¹ but had to choose between a rebate or low-interest rate financing through a local credit union to complete the recommended upgrades.² By signing up during the promotion, participants could receive both the rebate and financing, for a combined value of approximately \$2,300 per household. Even with the sizable incentive, Austin Energy leveraged \$4.39 million in loans using \$700,000 of its Better Buildings seed funding to pay for the incentives and marketing to launch the promotion.

Figure 1. Best Offer Ever Promotion Results

Data reflect energy upgrades completed between October 1, 2010, and March 31, 2011, under the Best Offer Ever. The Best Offer Ever was only available to homeowners who signed up between October 1 and December 31, 2010.



Metric	Count	Percentage
Energy evaluations ¹	594	
Energy upgrades	564	(95% of evaluated homes)
Loans issued	564	(100% of upgraded homes)

The Better Buildings Neighborhood Program is part of the national Better Buildings Initiative led by the U.S. Department of Energy.

Handbooks - Toolbox

Toolbox: Templates, forms, tools, calculators

Evaluation & Data Collection – Conduct Evaluation

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Toolbox

The following resources are available to help design, implement, and evaluate possible activities related to this handbook. These resources include templates and forms, as well as tools and calculators. The U.S. Department of Energy does not endorse these materials.

Templates & Forms

[Los Angeles County Energy Issues Phone Survey](#) (194 KB)

Author: Los Angeles County, California

Publication Date: 2010

Sample script Los Angeles County used to survey homeowners about energy issues.

[Connecticut Workshop Survey](#) (76 KB)

Author: Connecticut Neighbor to Neighbor Energy Challenge

Publication Date: 2011

Short survey for Connecticut's Neighbor to Neighbor Energy Challenge workshop participants. The workshop allowed the program to share its energy efficiency offerings with homeowners.

[EnergySmart Residential Survey](#) (81 KB)

Author: Boulder County Energy Smart

Publication Date: 2013

Example survey about a homeowner's experience with a visit from an energy advisor as part of EnergySmart in Boulder County, Colorado.

____ Efficient Appliances (please describe): _____

____ Heating, Ventilation, and Air Conditioning (please specify): _____

____ Clean energy (describe): _____

____ Other (please describe): _____

Handbooks – Topical Resources

Topical Resources: Presentations, publications, webcasts

Contractor Engagement & Workforce Development – Deliver Program

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Description Step-by-Step Tips for Success Examples Toolbox **Topical Resources**

Topical Resources

The following resources provide additional topical information related to this handbook, which include presentations, publications, and webcasts. Visit [Examples](#)  for materials from and about individual programs.

Topical Presentations

[The Contractor-Participation-Inducing Home Performance](#)
Author: Mike Rogers; OmStout Consulting, LLC
Publication Date: 2012
Presentation summarizing the important elements ne...

[Five Steps to a Profitable Contractor Base](#)  
Author: Courtney Moriarta; SRA International; Inc.; Emily
Building Performance Institute; Brad Geyer; Fayette Cou
Department of Labor; Sam Flanery; Building Science Acad
Publication Date: 2012
Presentation on five steps to building a profitable con...
administration, certification and credentialing, comm...
vs. trade), and training and sales support.

Five Steps to a Profitable Contractor Base

Session 2: Engaging Business Partners

Residential Energy Efficiency Solutions:
From Innovation to Market Transformation

Tuesday, July 10, 2012
Arlington, VA

1




U.S. DEPARTMENT OF **ENERGY** | Energy Efficiency & Renewable Energy [eere.energy.gov](#)

Handbooks – Quick Links

Quick Links: Access to pre-coded search results on key topics


Market Position & Business Model – Overview

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Quick Links

The following list provides access to resources with more information on these key topics. Selecting a key topic will return a list of resources related to that topic. If you have suggestions for additional key topics, [please tell us](#) .

- Business Models for Providing Energy Efficiency Services**

Every organization or business has a particular set of motivations and revenue generating opportunities that comprise their business model. Typical business models for providing energy efficiency services are documented for utility and non-utility program administrators, remodelers, HVAC (heating, ventilation, and air conditioning) performance contractors, home inspectors, utilities, energy service companies, and others.
- Cost-Effectiveness Tests**

Cost effectiveness tests compare the benefits of a utility or non-utility program with its associated costs. The five most common tests used by public utility/program administrator cost test (PACT), the ratepayer impact measure test (RIM), the total resource cost test (TRC), and the societal cost test (SCT).
- Non-Energy Benefits**

Energy efficiency programs provide identifiable benefits beyond energy savings, such as job creation, economic development, avoided emissions, and water savings. Quantifying these non-energy benefits may help program administrators demonstrate progress toward stated program and/or policy goals, or increase general awareness and support for program activities.
- Policies and Regulations Impacting Energy Efficiency Programs**

Policies and regulations, such as energy efficiency targets, utility cost-effectiveness tests, financial regulations, and others, influence how your organization provides energy efficiency services.

Future feature:
Clicking on a topic name will provide access to related resources

Handbooks – My Favorites

Better Buildings Residential Program Solution Center

EERE » BTO » Better Buildings Neighborhood Program » Solution Center Home » Program Components » Marketing & Outreach

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Marketing & Outreach – Deliver Program

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- Finance Favorites
6 items
- + New Favorites Folder**

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Add a new Favorites Folder

Description

It is time to put all of your planning efforts to work on your program's marketing and outreach activities. A successful program should be in place before you develop your [outreach partners](#), [staffing and workflow](#), [outreach materials](#), and [evaluation plans](#).

You and your partners will want to be ready for sudden program interest that can be generated by new marketing efforts. This requires coordination with contractors, relevant program staff, and financial resources to manage the influx of energy assessments, upgrade work, related applications.

Your program will use a variety of marketing and outreach to reach your [priority audiences](#). As soon as your marketing is underway, you should also begin to [track progress](#) and use various tactics to identify what works well in your local market.

Marketing & Outreach

Pages:

- [Overview](#)
- [Assess the Market](#)
- [Set Goals & Objectives](#)
- [Identify Partners](#)
- [Make Design Decisions](#)

Handbooks – Where Am I?

Where Am I: How the handbook fits into the Solution Center

Program Design & Customer Experience – Make Design Decisions

Where Am I?

Description

Step-by-Step

Tips for Success

Example

Description

Successful energy efficiency programs address the opportunities, and challenges of their local markets. Programs likely to succeed aren't those that pick random program elements. Instead, you should develop a coordinated program with elements that are designed to overcome multiple market barriers. The greatest fit of your program to your local context is where your program is tailored to your specific market, your program design is on:

- Your [market assessment](#) 📖, which identified needs in the market. Your program will be designed to seize the opportunities and overcome the barriers to adopting energy efficiency.
- Your [program goals and objectives](#) 📖, which define what the program seeks to achieve.
- Your [partners](#) 📖 who will help you deliver the program. Understanding of local contractors and their capacity, and local utilities.

If your organization has a detailed [business plan](#) 📖

program design. If your organization does not have a business plan, you will make many of these types of planning decisions as you develop your program design. A business plan typically describes your organization's:

Program Design & Customer Experience – Make Design Decisions

Overview

Strategy Development

- Assess the Market
- Set Goals & Objectives
- Identify Partners
- Make Design Decisions

Planning

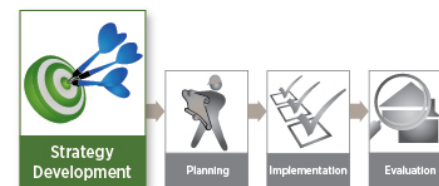
- Develop Implementation Plans
- Develop Evaluation Plans

Implementation

- Develop Resources
- Deliver Program

Evaluation

- Assess & Improve Processes
- Communicate Impacts



Better Buildings Residential Program Solution Center Examples

Example #1 (1 of 7)

Our program needs contractors to perform upgrades. How do I identify and recruit contractors to develop a local workforce ?

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The Better Buildings Residential Program Solution Center is a repository of lessons learned, resources, and knowledge for residential energy efficiency programs. It is a place where program administrators and their partners plan, implement, manage, and evaluate their programs.

Explore Program Components

Information in the Residential Program Solution Center is organized around the primary functions typically overseen by a residential energy efficiency program administrator, termed "program components" throughout this tool. Select a program component below.

```
graph TD; A[Market Position & Business Model] --> B[Program Design & Customer Experience]; B --> C[Evaluation & Data Collection]; C --> D[Marketing & Outreach]; D --> E[Financing]; E --> F[Contractor Engagement & Workforce Development];
```

Contractor Engagement & Workforce Development – Overview

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Description	Step-by-Step	Tips for Success	Examples	Toolbox	Topical Resources	Quick Links
<h4>Description</h4> <p>Successful residential energy efficiency programs depend on strong relationships with contractors. Contractors employ home performance professionals who implement energy efficiency measures in homes. These contractors are the face of your program, and, therefore, are critical partners in your success.</p> <p>Recognize contractors' critical role and deliberately approach workforce development to maximize your program's impact. Benefits of effective contractor relationships, contractor support, and workforce development efforts include:</p> <ul style="list-style-type: none">Contractors that actively engage in your program and help meet your shared goalsEfficient lead generation and sales efforts by contractors in line with their ability to deliver quality installationsHigh conversion rates that reflect higher homeowner participation in your programHigh quality of home performance services provided to homeownersHomeowner confidence that energy savings and comfort improvements will be realized, due to effective quality assurance and communicationsGrowth potential for contractors expanding in or entering the home performance marketGood job opportunities for local, qualified home performance professionals. <p>Recruiting, developing, and maintaining enough contractors to work with your program requires ongoing effort. Leading</p>						

Key Resources

- [DOE Guidelines for Home Energy Professionals](#) include standard specifications for quality work, critical tasks and core competencies for effective training programs, and a framework for professional certifications. The website includes job task analyses that describe the tasks and skills needed for specific jobs, information about accredited training programs, downloadable training modules, and other resources.
- [DOE Building America Solution Center](#) provides home performance professionals with building science resources, integrated energy efficiency tools, case studies, and best practices designed to dramatically reduce energy use in new and existing homes. This website includes expert information on hundreds of high-performance design and construction topics, including air sealing and insulation, HVAC components, windows, indoor air quality, and more.

Look Across Program Design Phases

Example #1: Contractor Engagement Overview (2 of 7)

Contractor Engagement & Workforce Development – Overview

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Step-By-Step

The following steps list important activities in Contractor Engagement & Workforce Development that you need to take into account the unique needs of your program at each step to access its handbook.

1. [Assess the Market](#) *Assess the quantity and capacity of available contractors.*
2. [Set Goals & Objectives](#) *Establish or refine specific workforce and contractor goals.*
3. [Identify Partners](#) *Establish relationships with contractors and training providers.*
4. [Make Design Decisions](#) *Decide on strategies for training, workforce development, and contractor engagement.*
5. [Develop Implementation Plans](#) *Develop workforce development, contractor engagement, and training plans.*
6. [Develop Evaluation Plans](#) *Develop a workforce quality assurance and evaluation plan.*
7. [Develop Resources](#) *Develop workforce and contractor engagement resources.*
8. [Deliver Program](#) *Implement contractor coordination and workforce development.*
9. [Assess & Improve Processes](#) *Monitor the effectiveness of workforce efforts, motivate continuous improvement, address low performers, and adapt as needed.*
10. [Communicate Impacts](#) *Communicate program results to workforce stakeholders and contractor partners.*

Contractor Engagement & Workforce Development – Identify Partners

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Step-by-Step

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A critical ingredient for your program's success is frequent engagement with contractors, initiated early and often. Your program may also want to work with training providers and local employment organizations to develop the skills of the local workforce and help connect those workers with jobs.

Your partners will include:

- Contractors that will become your most important service delivery partners
- Trade associations and economic development institutions that can help you promote your program to contractors and recruit them
- Training partners that can help you increase the number of trained and certified technicians in your workforce.

Your local [market assessment](#) revealed the many types of contractors you can partner with, including home performance contractors, HVAC contractors, insulation contractors, remodelers, and others. You also surveyed the range of local training and employment organizations that can help enhance the skills and qualifications of the local home performance workforce.

This handbook provides information and tools to help you:

- Assess potential contractor partners
- Develop strategies for contractor recruitment
- Establish ongoing relationships with contractors

Contractor Engagement & Workforce Development

Stages:

- [Overview](#)
1. [Assess the Market](#)
2. [Set Goals & Objectives](#)
3. [Identify Partners](#)
4. [Make Design Decisions](#)
5. [Develop Implementation Plans](#)
6. [Develop Evaluation Plans](#)
7. [Develop Resources](#)
8. [Deliver Program](#)
9. [Assess & Improve Processes](#)
10. [Communicate Impacts](#)

Example #1: Step-by-Step (3 of 7)

Contractor Engagement & Workforce Development – Identify Partners

[Where Am I?](#)



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Description

Step-by-Step

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Step-By-Step

Partnerships can broaden the reach of your relationships with contractors and establish effective partnerships.

▶ Assess potential contractor participation

▶ Develop strategies for contractor recruitment

▶ Establish ongoing relationships

▶ Engage and recruit workforce



▶ Evaluate potential workforce

▶ Establish partnership agreements

▼ Develop strategies for contractor recruitment

Recruiting and sustaining contractor participation in programs generally requires ongoing effort. Effective contractor recruitment strategies:

- Are built upon good program designs that minimize administrative requirements, while still maintaining quality standards
- Establish a relationship between the program and the contractor
- Focus on the benefits of the program to the contractor and how they outweigh the costs of participation
- Help the contractor advance to the next stage of participation in the program, such as completing training/orientation or signing a participation agreement.

Your recruitment strategy should include identifying contractors, enticing them to participate, and continually supporting their participation in your program. As discussed when you [learned about contractors in your market](#) , canvas existing energy programs as well as local home performance contractors, HVAC contractors, and trade associations to identify contractors you might encourage to participate in your program. Consult online directories to find certified home performance professionals in your community. For guidance and resources on reaching out to contractors, including online contractor directories, see the [market assessment handbook](#) .

Example #1: Tips for Success (4 of 7)

Contractor Engagement & Workforce Development – Identify Partners

[Where Am I?](#)



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Description

Step-by-Step

Tips for Success

Examples

Toolbox

Topical Resources

Tips for Success

In recent years, hundreds of communities across the country have joined the Better Buildings Neighborhood Program. The following tips present the top lessons learned from these communities.

► Design a program that provides training, networking, and mentoring opportunities

► Establish collaborative partnerships with local businesses and organizations

► Help contractors enter the home performance market by lowering barriers to entry and providing training, networking, and mentoring opportunities

► Help contractors enter the home performance market by lowering barriers to entry and providing training, networking, and mentoring opportunities

Entering a new market adds risk to contractors' businesses. As several Better Buildings Neighborhood Program partners focused on their efforts to attract contractors, they realized that it would be valuable for them to help contractors enter the home performance market. Many programs took steps to lower or eliminate unnecessary hurdles or barriers to contractors' successful entry into the market. These barriers included long delays to receive payment for the program, paperwork burdens that were sometimes excessive enough to make contractors reluctant to participate, and program expectations that were unclear to contractors. Programs have also used equipment loan programs, subsidized training, and other strategies to lower the upfront costs of entering the home performance market.

To help contractors learn the trade and enter the home performance market, many programs have offered training and mentoring. Taking steps to help contractors enter the home performance market can help you establish a trained workforce of high-quality contractors to support home performance work.

- [Fayette County, Pennsylvania](#) helped [contractors enter the market](#) by providing grants and financing to minimize startup costs, and by giving contractors the opportunity to provide Building Performance Institute (BPI) certification to their technicians. The program partnered with a local private industry council to train technicians to become BPI certified at no cost to students. The partnership program helped new home performance professionals start new businesses, for example, by providing grants and low-interest loans to purchase computer software and professional equipment. Training and certification in the home performance industry provides Fayette County residents with an opportunity for stable and well-paying careers.
- New Hampshire's [Beacon Communities Project](#) sought to reinvigorate the local economy of Berlin, New Hampshire, following the 2006 closure of a pulp mill. The program began working with local community colleges to provide BPI-certified training to develop more qualified home performance professionals. The program supplemented the training with mentoring opportunities for students who completed classroom trainings but needed more experience in the field before being hired by a contractor or starting their own company. In the nearly three years since the program's launch in September 2013, 42 students had been trained through these classes and mentorships. These trained students helped the program offer quality home performance upgrades to homeowners, and the mentorship is helping students become qualified home performance professionals.

Example #1: Examples (5 of 7)

Contractor Engagement & Workforce Development – Identify Partners

[Where Am I?](#)



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Description

Step-by-Step

Tips for Success

Examples

Toolbox

Topical Resources

Examples

The following resources are examples from individual residential energy program presentations and reports, and program materials. The U.S. Department of Energy provides these materials.

Case Studies

[A Business Case for Home Performance Contracting](#)  

Author: Pacific Northwest National Laboratory

Publication Date: 2012

This report contains information on the market for home performance contracting; the needs and costs of home performance contracting; home performance business approaches; and how to reach customers. It also contains detailed profiles of eight successful contractors.

[Home Performance with ENERGY STAR Contractor Stories](#) 

Author: U.S. Department of Energy

These case studies highlight examples of participating contractors using ENERGY STAR to help homeowners improve their homes' energy efficiency.

[LaborWorks@NeighborWorks of Western Vermont Focus Series](#)

Author: U.S. Department of Energy

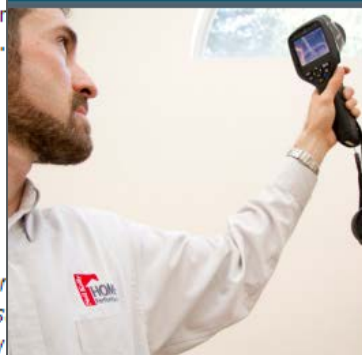
Publication Date: 2012

LaborWorks @ NeighborWorks is a nonprofit temporary labor pool (NWWVT) to assist professional contractors involved with the Home Energy Assistance Program (HEAT). In the first of this Focus Series, DOE interviews Melinda on why NeighborWorks set up the temporary labor pool, how it works, and what programs to consider.

U.S. DEPARTMENT OF
ENERGY

Energy Efficiency &
Renewable Energy

BUILDING TECHNOLOGIES PROGRAM



BUILDING AMERICA ENERGY RENOVATIONS

A Business Case for Home Performance Contracting

PREPARED BY

Pacific Northwest National Laboratory

October 2012

Example #1: Toolbox (6 of 7)

Contractor Engagement & Workforce Development – Identify Partners

[Where Am I?](#)



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[Print this page](#)

Description

Step-by-Step

Tips for Success

Examples

Toolbox

Topical Resources

Toolbox

The following resources are available to help design, implement, and evaluate energy efficiency programs. These resources include templates and forms, as well as tools to endorse these materials.

Templates & Forms

[Efficiency Maine Residential Registered Vendor Agreement Form](#)

Author: Efficiency Maine

Publication Date: 2014

A short, checklist-style form that contractors complete to verify whether they meet basic program qualifications, and describe other information about the contractor.

Tools & Calculators

[Green for All Energy Efficiency Toolkit](#)

Author: Green For All

Publication Date: 2012

This practitioner-focused Toolkit for Residential Energy Efficiency is designed to help energy efficiency program managers assist new, established, and future energy efficiency program managers. It is intended as a practical program manager can deploy to implement a variety of energy efficiency programs, including summary documents, RFPs, contracts, and other program materials. Nationwide have used to create their own efficiency programs.



Residential Registered Vendor Agreement Form

To be listed as a Registered Vendor on the [Efficiency Maine website](#), please complete this form, sign it and submit it with the appropriate documentation.

Section 1: Registered Vendor Information. Please enter information you would like to appear on the website.

Business Name		Phone Number	
Street Address		Fax Number	
City, State, Zip		Business Email	
Contact Name		Website	

Section 2: Basic Requirements. Please include the following documentation when submitting agreement form.

<input checked="" type="checkbox"/>	Required Documentation
<input type="checkbox"/>	Code of Conduct: http://www.efficiencymaine.com/docs/EMCode-of-Conduct.pdf
<input type="checkbox"/>	General Commercial or Professional Liability Insurance (Minimum coverage: \$500,000)
<input type="checkbox"/>	Workers Compensation Insurance (Minimum coverage: \$500,000) <i>Please Note: A Sole Proprietor without employees is not required to have Workers Compensation coverage. Similarly, a Limited Liability Corporation without employees is not required to have Workers Compensation coverage for the owners. If your business is exempt from this requirement, please write "NA" in the checkbox to the left.</i>

Section 3: Service Offerings and Qualifications. To have the following services reflected on the [Efficiency Maine Locator](#), please check the rows that apply and **SUBMIT DOCUMENTATION OF APPLICABLE QUALIFICATION(S)**:

<input checked="" type="checkbox"/>	Service Offering	Qualification(s)*
<input type="checkbox"/>	Energy Advisor	Building Performance Institute (BPI) Building Analyst AND Maine Limited Energy Auditor Technician (LEAT) license
<input type="checkbox"/>	Air Sealing and Assessment	Building Performance Institute (BPI) Building Analyst AND Maine Limited Energy Auditor Technician (LEAT) license
<input type="checkbox"/>	Insulation	Insulation installation training
<input type="checkbox"/>	Heat Pumps	Environmental Protection Agency (EPA) Section 608 Refrigerant Handling Certification AND installation training within the last two years by a manufacturer of ENERGY STAR heat pumps
<input type="checkbox"/>	Gas	Maine Fuel Board License (Master or Journeyman, Propane and Natural Gas Technician)
<input type="checkbox"/>	Oil	Maine Fuel Board License (Master or Journeyman, Oil and Solid Fuel Technician)

Example #1: Topical Resources (7 of 7)

Contractor Engagement & Workforce Development – Identify Partners

[Where Am I?](#)



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[PDF version](#)



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Description

Step-by-Step


Tips for Success

Examples

Toolbox

Topical Resources

Topical Resources

The following resources provide additional topical information related to this publication, and webcasts. Visit [Examples](#)  for materials from and about

Topical Presentations

[Contractor Outreach: Design & Implementation for Residential Retrofit Programs](#)

Author: Jared Asch; Efficiency First

Publication Date: 2011


This presentation describes strategies for outreach to energy contractors and incentives.

[The Contractor-Participation-Inducing Home Performance Programs](#)

Author: Mike Rogers; OmStout Consulting; LLC

Publication Date: 2012

Presentation summarizing the important elements needed to induce contractor participation in home performance programs.

[Five Steps to a Profitable Contractor Base](#)  

Author: Courtney Moriarta; SRA International; Inc.; Emily Levin; Vermont Building Performance Institute; Brad Geyer; Fayette County Better Building Department of Labor; Sam Flanery; Building Science Academy

Publication Date: 2012

Presentation on five steps to building a profitable contractor base. The steps include: business plan development, administration, certification and credentialing, communicating with contractors, contractor requirements (business vs. trade), and training and sales support.

Contractor Outreach

Design and Implementation of Residential Retrofit Programs



EfficiencyFirst



HOME
PERFORMANCE
RESOURCE CENTER

Example #2 (1 of 4)

Our program is starting soon, and we need to research what the market for energy efficiency looks like in our community. What should I do to understand the market?

Better Buildings Residential Program Solution Center

EERE » BTO » Better Buildings Neighborhood Program » Solution Center Home »

Solution Center Home
About
Handbook Index
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Glossary

BROWSE BY:
Program Components
Program Design Phases
Content Types

Access Program Component Handbooks

Market Position & Business Model → Program Design & Customer Experience → Evaluation & Data Collection

Marketing & Outreach → Financing → Contractor Engagement & Workforce Development

Explore Program Design Phase Resources

Strategy Development → Planning → Implementation → Evaluation

MY FAVORITES
Finance Favorites
6 items
Marketing & Outreach Favorites
1 items
New Favorites Folder

RECENTLY UPDATED RESOURCES

Program Design & Customer Experience – Deliver Program
Efficiency Maine Downloads and Forms Portal
New York State Energy Research and Development Authority (NYSERDA) Home Performance with ENERGY STAR Contractor Manual
EnergySmart Residential Survey (81 KB)
RePower Bainbridge Upgrade Survey (333 KB)

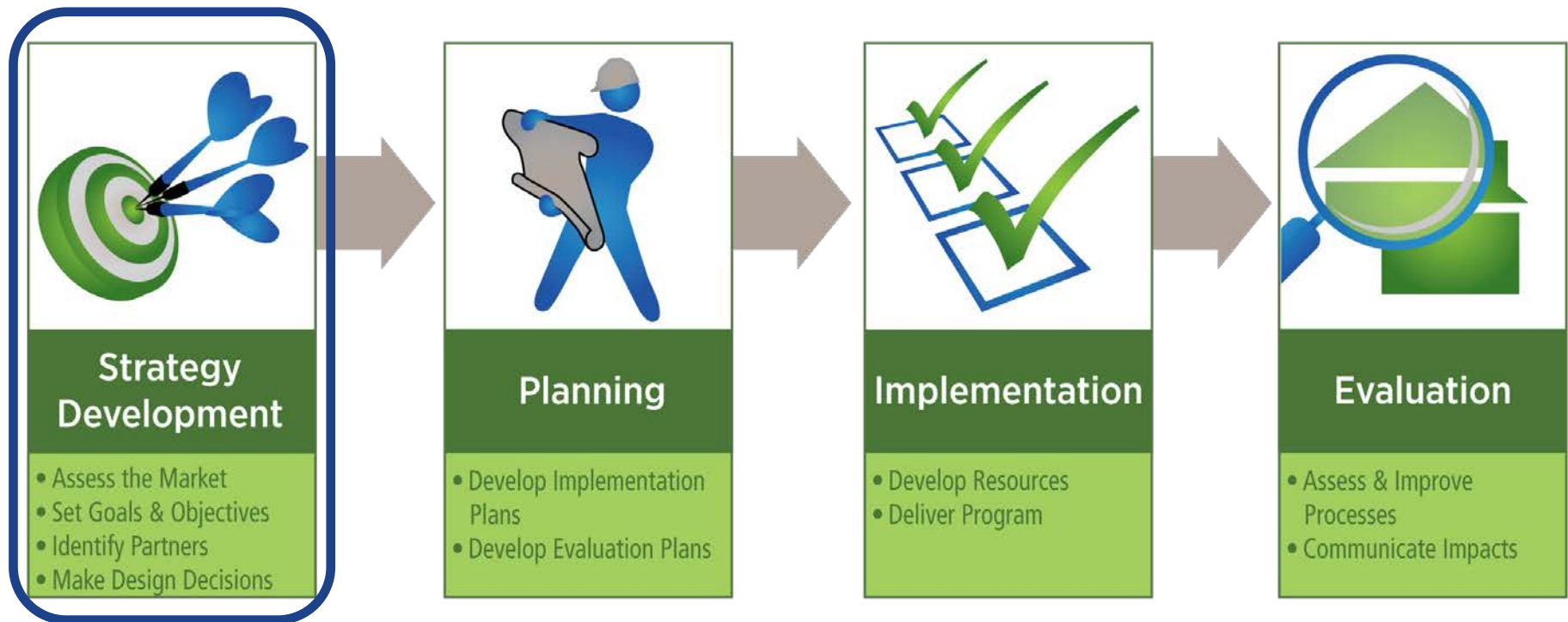
MOST POPULAR HANDBOOKS

Market Position & Business Model – Overview
Marketing & Outreach – Overview
Financing – Overview
Program Design & Customer Experience – Overview
Market Position & Business Model – Assess the Market

ACKNOWLEDGEMENTS

The U.S. Department of Energy thanks the following individuals who conducted an expert review of the Better Buildings Residential Program Solution Center handbooks:

Example #2: Program Design Phase (2 of 4)



Example #2: Strategy Development (3 of 4)

Better Buildings Residential Program Solution Center

[EERE](#) » [BTO](#) » [Better Buildings Neighborhood Program](#) » [Solution Center Home](#) »

[Solution Center Home](#)

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BROWSE BY:

Program Components

Program Design Phases

Content Types

Enter your keywords

assess the market

Search

Search results

Financing – Assess the Market

Determine how your target audience currently funds energy efficiency services, to what extent upfront cost is a barrier, and whether improvements to their financing options would increase the uptake of energy efficiency measures.

Marketing & Outreach – Assess the Market

Identify and prioritize potential target audiences based on their likely receptivity to your program's services.

Contractor Engagement & Workforce Development – Assess the Market

Learn about the capabilities and services of existing contractors and training providers working in your market.

Program Design & Customer Experience – Assess the Market

Research and analyze the specific barriers, needs, and opportunities for a residential energy efficiency program in your community.

Market Position & Business Model – Assess the Market

Survey existing and potential demand for energy efficiency products and services based on an understanding of policies, housing and energy characteristics, demographics, related initiatives and other market actors.

CURRENT SEARCH

Search found 13 items

assess the market

(-) Strategy Development

Clear All Filters

FILTER BY CONTENT TYPE:

Handbook (13)

FILTER BY PROGRAM COMPONENT:

Market Position & Business Model (4)

Program Design & Customer Experience (2)

Marketing & Outreach (3)

Financing (2)

Contractor Engagement & Workforce Development (2)

FILTER BY PROGRAM DESIGN PHASE:

(-) Strategy Development

Example #2: Handbooks (4 of 4)

Market Position & Business Model – Assess the Market

Where Am I?



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Description Step-by-Step Tips for Success Examples Toolbox Topical Resources

Description

This handbook will help you assess what kind of energy efficiency activities and actors (e.g., home performance contractors, HVAC contractors, remodelers, retailers, utilities, lenders, and homeowners) currently exist in your community and the level of interest in new energy efficiency efforts. Using this information, this handbook will ultimately help you understand the role your organization can play in filling current or future demand for energy efficiency upgrades in your target market.

You will first learn how to assess the nature of current and potential demand for energy efficiency products and services (e.g., home assessments, energy efficiency upgrades, loans or products to finance upgrades, contractor training) in your community and what factors can influence this demand. You will then be provided with tools for determining how the market is already being served by other organizations and where your organization could provide value in delivering energy efficiency services. To round out your market assessment, you will learn how to identify your organization's strengths, capabilities, and constraints in providing needed products and services. You will also learn how to use that information to determine the next steps for your organization as you undertake a residential energy efficiency program.

A thorough market assessment—giving careful consideration to trends, opportunities, gaps, and barriers—will help you determine if you should enter the market and if so, how to develop a business model that yields economic, environmental, and energy benefits for your community. If your organization decides to enter the energy efficiency market or significantly change its role in the market, you will want to undertake a more detailed market assessment to inform your program design and strategy (see the handbooks below for more information).

Market Position & Business Model

Stages:

1. [Overview](#)
2. [Assess the Market](#)
3. [Set Goals & Objectives](#)
4. [Identify Partners](#)
5. [Make Design Decisions](#)
6. [Develop Implementation Plans](#)
7. Develop Evaluation Plans
8. Develop Resources
9. Deliver Program
10. Assess & Improve Processes
11. Communicate Impacts

Access Step-by-Step, Tips, and resources

General description of how to assess what kind of energy efficiency activities and actors exist in your community

Find related information across other program components:

- [Program Design & Customer Experience – Assess the Market](#)
Research and analyze the specific barriers, needs, and opportunities for a residential energy efficiency program in your community.
- [Marketing & Outreach – Assess the Market](#)
Identify and prioritize potential target audiences based on their receptivity to energy efficiency services.
- [Financing – Assess the Market](#)
Determine how your target audience currently funds energy efficiency services, to what extent upfront cost is a barrier, and whether improvements to their financing options would increase the uptake of energy efficiency measures.
- [Contractor Engagement & Workforce Development – Assess the Market](#)
Learn about the capabilities and services of existing contractors and training providers working in your market.

Access related information across all program components

Example #3: Homepage (1 of 3)

How do I develop an RFP to procure the financing services that my customers need?

Better Buildings Residential Program Solution Center

EERE » BTO » Better Buildings Neighborhood Program » Solution Center Home »

Solution Center Home

The Better Buildings Residential Program Solution Center is a repository of lessons, resources, and knowledge for residential energy efficiency programs. It is intended to help program administrators and their partners plan, implement, manage, and evaluate their programs.

Explore Program Components

Information in the Residential Program Solution Center is organized into functions typically overseen by a residential energy efficiency program administrator, termed "program components" throughout this tool. Select a component to explore its resources.

BROWSE BY:

- Program Components
- Program Design Phases
- Content Types

RECENTLY UPDATED RESOURCES

Financing – Overview

[Where Am I?](#)

[PDF version](#) [Print this page](#)

Description	Step-by-Step	Tips for Success	Examples	Toolbox	Topical Resources	Quick Links
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Step-By-Step

The following steps list important activities for successful program administrators to take when implementing Financing activities; however, no two programs are the same, and program administrators need to take into account the unique aspects of their market to create the most effective approach possible. Select each step to access its handbook.

- Assess the Market**
Determine how your target audience currently funds energy efficiency services, to what extent upfront cost is a barrier, and whether improvements to their financing options would increase the uptake of energy efficiency measures.
- Set Goals & Objectives**
Establish goals, objectives, and timeframes for your financing activities.
- Identify Partners**
Identify and partner with financial institutions that can provide capital, underwriting, and other functions to enable your customers to access financing.
- Make Design Decisions**
Determine if enhancements to existing financing products or the development of new products are necessary to allow you to achieve your goals and objectives.
- Develop Implementation Plans**
Develop a plan to implement your financing activities, with defined roles for financial institution partners, contractors, customers, and your program.
- Develop Evaluation Plans**
Establish an evaluation plan that will allow you to determine how your financing activities are impacting the market.
- Develop Resources**
Develop the procurement, outreach, and loan support resources required to perform your financing activities.
- Deliver Program**
Launch your financing activities in coordination with other program components.
- Assess & Improve Processes**
Focus on the continuous improvement of your financing activities by tracking and evaluating data, responding to feedback, and modifying strategies when needed.
- Communicate Impacts**
Communicate the results of your financing activities to internal and external partners.

```
graph TD; MPBM[Market Position & Business Model] --- PDCP[Program Design & Customer Experience]; PDCP --- MO[Marketing & Outreach]; PDCP --- F[Financing];
```

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Better Buildings
U.S. DEPARTMENT OF ENERGY

Example #3: Handbook (2 of 3)

Financing – Identify Partners

[Where Am I?](#)

Description

Step-by-Step

Tips for Success

Examples

Toolbox

Step-By-Step

Developing strong working relationships with your lending partner customers in accessing loans for their home energy upgrades. B more lenders can occur in parallel with [making financing design](#) practice to involve prospective or formal financial partners in the

To establish relationships with lenders that will offer consumer f efforts, consider the following steps:

► Identify lenders

► Engage lenders

► Determine the process for soliciting proposals

► Evaluate proposals

► Negotiate and execute the lending agreement

Key Items to Include in Solicitations for Lending Partners

Key items to consider including in solicitations for lending partners are listed below. Do not develop the items for your solicitation in a vacuum; consultations with at least a few potential lenders will help you develop a solicitation that meets your program's needs and one that lenders understand and can respond to quickly with a proposal.

You will want to include background information about your program as well as requests for specific information from the lender. Make sure to define the prescribed format and content for proposals in response to the solicitation, and the rules, processes, and schedule that will lead to the selection of lenders.

Program background for you to include:

- Program summary and goals
- Existing program partners and their roles over the full program development and implementation period, as well as the roles you anticipate for the lending partner
- Available government funding and guidelines (if applicable)
- The target borrower market, the types of energy efficiency projects to be financed, and the economics of the projects
- Clean energy investment and lending volume targets

Items to ask lenders to respond to:

- Proposed structure and terms of the energy efficiency loans, including eligible borrowers, eligible projects, expected loan tenors, underwriting guidelines, and proposed loan terms
- Proposed structure of credit enhancements or revolving loan funds, including a risk-sharing formula
- Sources of capital and ability to attract additional sources of funds
- Financial stability of proposed lender and experience with residential energy efficiency loans
- Qualifications of the proposed lender's program manager, personnel, and support staff

Evaluate proposals

After you issue a solicitation for a lending partner, the next task is to evaluate the proposals and select a lender. Best practice for evaluation of proposals is to develop a scoring sheet that provides members of the evaluation team with a method to rank the qualifications of bidders objectively.

In addition to your organization's standard qualification criteria, you should carefully evaluate the proposal for:

- Financial stability and experience of the responding lender
- Qualifications and adequacy of the proposed program manager and staff
- A detailed description of the functions that will be performed by the lender
- A detailed description of the process and why the process will be acceptable to contractors
- A detailed description of the IT and other systems that will support the process
- A description of the method of compensation
- Reporting capabilities
- Quality control and quality assurance related to loan administration.

Description	Step-by-Step	Tips for Success	Examples
<h3>Program Materials</h3> <p>Sample RFP: City of Independence, Missouri  (217 KB) Author: City of Independence, Missouri Publication Date: 2010 <i>A sample competitive procurement procedure to award lo</i></p> <p>Sample RFP: Greensboro Energy Efficiency Loan Produ Author: Better Buildings of Greensboro, North Carolina Publication Date: 2011 <i>A sample RFP from Greensboro, North Carolina, for energ</i></p>			
<h3>Templates & Forms</h3> <p>Financing Program Goals and Design Template Present Author: U.S. Department of Energy Publication Date: 2011 <i>Template for program administrators to fill out to help det</i></p> <p>DOE Template Financial Institution RFP  (659 KB) Author: U.S. Department of Energy Publication Date: 2010 <i>A template competitive procurement procedure to award</i></p>			

[INSERT GRANTEE LOGO]

[NOTE: Numbers and any fictional names are used for illustrative purposes]

REQUEST for PROPOSALS (RFP)
for Residential Energy Efficiency Loan Facilities:
 [] City

Proposal Due Date: September X, 2010 at XX:00 a.m.

Send Proposals to: City of []
 Office of Sustainability
 789 Main St
 [City], [State] 19890

If you have questions about this RFP, please contact:

Lead Contact for RFP Questions & Communications: Cary S. Ford, Projects Manager
 800-123-4567, CFord@City.gov

1. Request for Proposals (“RFP”)

Based on a grant from the [] State Energy Fund (“SEF”), the City of [] (the “City”) is seeking a financial institution (FI) partner to participate in its city-wide energy efficiency initiative (“Program”). We are requesting proposals from FIs to provide the following services:


- assist in final structuring of the energy efficiency loan program, in collaboration with the City and its financial advisor, Energy Finance Corp. (“EFC”);
- originate and provide energy efficiency (“EE”) loans (“Loans”) to residential energy users (and, possibly in the future, small commercial and non-profit energy users);
- manage a loan loss reserve fund (“LRF”), or other credit enhancement mechanism (see Section 5), funding for which shall be provided by the City to enhance the credit structure of the Loan portfolio;
- provide related Loan administration services, e.g., billing and collections; and
- provide reports on the Loan portfolio and LRF.


Example #4 (1 of 2)


I need to explore options for setting up a quality assurance program. Where do you talk about that?


BBNP Search

Search results

[NYSERDA Quality Assurance Procedures](#)  (310 KB)
Author: New York State Energy Research and Development Authority
Publication Date: 2012
This section of NYSERDA's Home Performance Contractor Resource Guide describes quality control procedures for initial review, field inspection, and administrative review of projects. Supporting worksheets are available to assist with compliance and verification.

[Quality Assurance and Enduring High Quality Work](#) 
Author: U.S. Environmental Protection Agency
Publication Date: 2011
Overview of quality assurance guidelines for Home Performance with ENERGY STAR.

[Data Driven Quality Assurance & Quality Control](#) 
Author: Patrick Roche; Conservation Services Group
Publication Date: 2012
Presentation describing how Conservation Services Group uses data to monitor market transformation and for internal QA/QC purposes.

[Job Quality, Equitable Access and Quality Assurance Standards in Leading Residential Weatherization Programs](#) 
Author: Community Benefits Law Center
Publication Date: 2010
Summary of the standards that support job quality, equitable access and quality assurance in several residential energy efficiency programs from different parts of the country.

CURRENT SEARCH

Search found 17 items
quality assurance

[Clear All Filters](#)

FILTER BY CONTENT TYPE:

- [Handbook \(5\)](#)
- [Tips for Success \(5\)](#)
- [Program Materials \(2\)](#)
- [Publications \(2\)](#)
- [Topical Presentations \(2\)](#)
- [Webcast \(1\)](#)

FILTER BY PROGRAM COMPONENT:

- [Program Design & Customer Experience \(4\)](#)
- [Evaluation & Data Collection \(3\)](#)
- [Financing \(3\)](#)
- [Contractor Engagement & Workforce Development \(10\)](#)

FILTER BY PROGRAM DESIGN PHASE:

- [Overview \(4\)](#)
- [Strategy Development \(9\)](#)
- [Planning \(7\)](#)
- [Implementation \(8\)](#)
- [Evaluation \(6\)](#)

FILTER BY STATE OR TERRITORY:

Use filters to further refine results

Example #4: Filter for Handbooks (2 of 2)

BBNP Search

Enter your keywords

quality assurance

Search

Search results

Contractor Engagement & Workforce Development – Overview

Support and partner with the workforce who will deliver your program's energy efficiency services by understanding their capacity, recruiting contractor partners, enabling technical training and business development support, fostering clear communication, and refining program processes over time, in partnership with your workforce.

DOE Technical Assistance Program

U.S. DEPARTMENT OF
ENERGY

Energy Efficiency &
Renewable Energy



The Parker Ranch installation in Hawaii

Quality Assurance for Residential Retrofit Programs

October 26, 2010

Jim Grevatt

Vermont Energy Investment Corporation
DOE Technical Assistance Program
Team 4 – Program & Project Development &
Implementation



Quality Assurance Best Practices

Quality Assurance Best Practices: Home Performance with ENERGY STAR Programs

While the EPA's Home Performance with ENERGY STAR is not the only whole house retrofit program in operation, it offers a set of standard guidelines and best practices for Quality Assurance (QA) that should be utilized in starting any new or updating existing home retrofit programs.

In order to sponsor a Home Performance with ENERGY STAR program, organizations must submit an implementation plan which includes Quality Assurance protocols. In order to meet ENERGY STAR requirements, QA plans must explain how the program will ensure participating contractors will meet program standards. QA plans must explain:

- **Contractor company and staff qualification requirements** intended to ensure that qualified building scientists are assessing the home and are capable of protecting the brand promise of ENERGY STAR. These capabilities include:

Contractor staff understand how to represent the program and their participation in it

Contractor staff understand the energy efficiency strategies applicable for residential retrofits

Contractor staff can protect the health and safety of occupants when installing energy efficiency measures

Contractor companies have proper licenses, insurance, etc.

Contractor companies sign participation agreements that outline proper conduct and program requirements

Reporting process that requires participating contractors to report jobs that are promoted by owners and performed under the HPwES logo.

Some – but not all – programs want to pre-approve jobs prior to commencement. However, this pre-approval tends to slow down jobs and can potentially reduce the audit-to-retrofit conversion rate.

Compliance with program requirements and industry standards (see below)

Reporting process that ensures program compliance and provides for follow-up contractor when necessary

Reporting of jobs (aka "file checks") serve multiple purposes:

- Rebate processing (i.e., eligibility of installed measures)
- Sufficient data to have some reasonable assurance that measures will save energy
- Confirmation that health & safety measures were being followed
 - Combustion safety – draft test, Combustion Appliance Zone (CAZ) tests
 - Ventilation – ASHRAE compliance
 - Lead safe practices
 - Other (moisture, asbestos, etc.)
- Data that could be used to inform an on-site QA visit
- Opportunity to mentor contractors

Solution Center Home Page

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Browse by Design Phases

Browse by Content Types

Better Buildings Residential Program Solution Center

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Solution Center Home

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BROWSE BY:

Program Components

Program Design Phases

Content Types



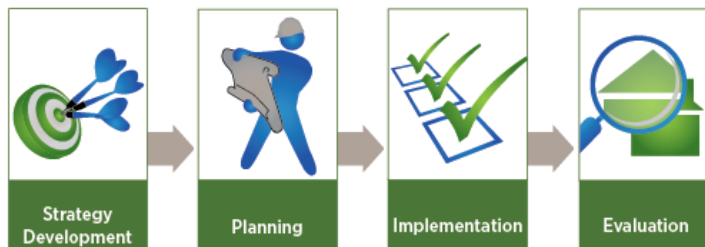
Browse by Program Components

Center is a repository of examples, agency programs. It is intended to help generate, and evaluate their programs.

Handbooks



Explore Program Design Phase Resources



Search

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MY FAVORITES

Finance Favorites

6 items

Marketing & Outreach Favorites

1 items

+ New Favorites Folder

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[Program Design & Customer Experience – Deliver Program](#)

[Efficiency Maine Downloads and Forms Portal](#)

[New York State Energy Research and Development Authority \(NYSERDA\) Home Performance with ENERGY STAR Contractor Manual](#)

[EnergySmart Residential Survey \(81 KB\)](#)

[RePower Bainbridge Upgrade Survey \(333 KB\)](#)

MOST POPULAR HANDBOOKS

[Market Position & Business Model – Overview](#)

[Marketing & Outreach – Overview](#)

[Financing – Overview](#)

[Program Design & Customer Experience – Overview](#)

[Market Position & Business Model – Assess the Market](#)

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Popular Handbooks

ACKNOWLEDGEMENTS

The U.S. Department of Energy thanks the following individuals who conducted an expert review of the Better Buildings Residential Program Solution Center handbooks:

Better Buildings Residential Program Solution Center Next Steps

Summer 2014: Peer Review & Beta Use

- Peer reviewers will comment on technical validity, market relevance, and framing
- Beta User access:
 - <https://bbnp.pnnl.gov/>
 - Username: betauser
 - Password: bbrpsc
- Create a user account to customize experience
- Get involved!
 - Sign up to become a beta user now or email: BBRPSolutionCenter@erg.com

Access the Solution Center

The screenshot shows the 'Better Buildings Residential Program Solution Center' website. At the top, there's a navigation bar with 'My Favorites', 'Account', and 'Log Out' links, along with a search bar. Below the header, a breadcrumb trail reads 'EERE » BTO » Better Buildings Neighborhood Program » Solution Center Home ». The main content area is titled 'Solution Center Home' and includes a description: 'The Better Buildings Residential Program Solution Center is a repository of examples, lessons, and resources for residential energy efficiency programs. It is intended to help program administrators and their partners plan, operate, and evaluate their programs.' A section titled 'Access Program Component Handbooks' features a flowchart with six boxes: 'Market Position & Business Model', 'Program Design & Customer Experience', 'Evaluation & Data Collection', 'Marketing & Outreach', 'Financing', and 'Contractor Engagement & Workforce Development'. Below this, 'Explore Program Design Phase Resources' shows a four-step process: 'Strategy Development', 'Planning', 'Implementation', and 'Evaluation'. On the right side, there are sections for 'MY FAVORITES' (listing 'Finance Favorites' with 6 items and 'Marketing & Outreach Favorites' with 1 item), 'RECENTLY UPDATED RESOURCES' (listing various program design and customer experience resources), 'MOST POPULAR HANDBOOKS' (listing 'Market Position & Business Model - Overview', 'Marketing & Outreach - Overview', 'Financing - Overview', 'Program Design & Customer Experience - Overview', and 'Market Position & Business Model - Assess the Market'), and 'ACKNOWLEDGEMENTS' (stating that the U.S. Department of Energy thanks individuals who conducted an expert review of the Solution Center handbooks).

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Email comments about the Solution Center to:
BBRPSolutionCenter@erg.com